Create new person

The following explains step by step how a new person is created in Personalwolke Time.
Changing the data of an existing person works the same way. After opening the person from the overview, changes can be made in the individual tabs of the master data.

- Prerequisites[1]
- Step 1: Open the persons overview[2]
- Step 2: Header[3]
- Step 3: Enter further master data[4]
- Step 4: "Master data" tab - Password manager[5]
- Step 5: "Master data" tab - Bank accounts[6]
- Step 6: "Groups" tab[7]
  - Step 6a: Assign a permission group (loose group)[8]
  - Step 6b: Add further group(s)[9]
  - Step 6c: Assign to a location[10]
- Step 7: "Roles" tab[11]
- Step 8: "Settings" tab[12]
  - 8a - Travel[13]
  - 8b - Workflow settings[14]
  - 8c - Groupware[15]
  - 8d - Time tracking[16]

NOTIZ

A prerequisite for creating a new person is that the hierarchical group (organizational unit) this person is to belong to (or, for retroactive creation, already belongs to) already exists in the system, since assignment to this group is a required field when creating the person.

Note: the tabs

- *Action permissions*
- *In the area of responsibility of these role holders*
- *Storage*
- *Login attempts*
- *NFC tags*

are not relevant for creating a new person or are purely informational. They are therefore not covered here.

Prerequisites

Before you create a new employee, you should answer the following questions for yourself:

- Which **department** will the employee work in?
  - Does this department **already exist**?
    - Yes: Continue with the next question.
    - **No**: Continue here: Create a new department (group)[17]
- What **username** will the employee get?
- What **employee number** will the employee get?

- Does the employee have a **special function (role)** in the company (personnel, supervisor)?
  - No: Continue with the next question
  - **Yes**: **Which one?** Personnel or supervisor or both?
- Should the employee get additional menu items in Personalwolke?
  - Employee / department administration # Admin
  - Additional reporting options for employees --> Management
- Which **time model** (weekly schedule) should be assigned to the employee?

After answering these questions, you have the minimum information required to create a person.

Step 1: Open the persons overview

At the top left of this view you will find the "+ New person" button. Clicking it opens a new person master data sheet

Step 2: Header

Enter the following data here:

- First name
- Last name
- Valid from: by default set to today's date
- Valid to: by default set to 01/01/3000

By entering a "Valid from" date that is already in the past, it is also possible to record an employee retroactively. It is likewise possible to limit the validity of their data in the future.

Step 3: Enter further master data

- **Active user**: checkbox, checked by default.
  An active user can access the system within the scope of their permissions. Employees with a temporarily inactive employment (e.g., maternity leave) can also continue to be managed as active users. Inactive users can be employees who have no system access due to their working conditions, with their requests etc. being submitted by third parties.
- **Client:** your organization
- **Group:** enter here the hierarchical group the new person is to belong to
- **Username:** according to your organization's naming convention. It must be unique and must also be communicated to the new person, as it is required for the user to log in to the system
- **Employee number:** consisting of the prefix and a unique name abbreviation, according to your organization's naming convention
- **Email:** the business email address (required for password resets)
- **Language:** German and English are currently available
- **Time zone**: according to your company location, usually CET (Central European Time/Vienna, Berlin, Paris)
- **Menu:** choice between "Desktop" and "Mobile"
- **Link page with menu:** On by default, corresponds to the usual navigation behavior.

    - If on: When you jump or are forwarded from one action to another, and also when you call up an action directly by entering an address or via a browser bookmark, the action you are currently on is highlighted in the menu.
        - In some cases, however, this can be ambiguous, e.g., if actions are stored multiple times in the menu structure, or if target actions are not present in the menu structure directly but can only be reached indirectly through jumps/redirects.
    - If off: After jumps to other actions, the original action you came from remains active. This is rather unusual, but this way of working is preferred for special applications.
- **Date of birth**
- **Academic title**
- **Suffix title**
- **Gender**
- **Business contacts**
    - Phone
    - Fax
    - Mobile
    - Street
    - ZIP code
    - City
    - Country
    - NOTIZ
      Please enter the phone number **exclusively** in the form **+43 xxx xxxxxxxxx** (example: +43 676 123456789 or +43 1 1234567) to ensure the number can be recognized in reports and the like.
- **Photo/avatar**
- **Password management:** this area is only fully unlocked after the person is saved for the first time and is described in step 4.
- **Bank accounts**: this area is only fully unlocked after the person is saved for the first time and is described in step 5.

After clicking "Save" or "Save and close", the creation of the new person is complete, and the person has been assigned a **ZEF master record number** for time tracking.

Step 4: "Master data" tab - Password manager

Password assigned: The check mark indicates whether the password has been set. If it is empty, no password has been set for this user yet.

NOTIZ
When logging in for the **first time**, the employee must enter the following data:
Username = Username (case sensitive!)
Password = Standard password = also the username (case sensitive!)

NOTIZ
As soon as the employee has logged in with this data, the system prompts them to choose their own login data.

WARNUNG

Attention! The password chosen during this step is known only to the employee. It cannot be retrieved in the system!

WARNUNG

The first login MUST be done via the browser!
Entry via the app is not possible!

As soon as a password is entered for the first time, the check mark is set, and the date of this password initialization is recorded under "**Time of last password assignment**".

NOTIZ

To enable the user to log in, you must click the **Reset password** button under the **Password** tab. This resets the employee's password to their username (caution, case sensitive!), and it must be changed during the first login.

You can find more information on this topic under Assigning and changing a password as an admin[18] or Change password (by the user)[19]

Step 5: "Master data" tab - Bank accounts

At the end of the master data you will find the "Bank accounts" area.

Clicking the plus sign opens the field below it.
Please click "Add" to get to the input screen.

- Account for: selection options for different types of pay
- Account holder name
- Bank name
- BIC
- IBAN
- Valid from/Valid to

It is possible to create several accounts for different pay components.

Step 6: "Groups" tab

Before you start assigning groups, you should answer the following questions:

- Which settings and action permissions should the employee have access to?
- Is the employee a manager / executive?
- Is the employee an administrator of Personalwolke?
- Will the employee work at a specific location?
- Does your Personalwolke have additional functions (e.g., Outlook sync, on-call duty) or different views (e.g., different journals or absence reasons) that are controlled via permission groups (loose groups)?

Open the **Groups tab**.

You can see that the group you selected earlier when creating this new person's master data has already been assigned as the organizational unit.

Step 6a: Assign a permission group (loose group)

Now click the dropdown button at the top left of the tab; a selection menu opens.

Please select "Permission groups" (formerly "loose groups").

You can see that this new person has already been assigned to a permission group (loose group), namely the permission group (loose group) **XXX-ALLE (All employees)** [XXX = your company's prefix], because the group setting was configured so that every new employee is automatically assigned to this group. See Create a new group (department)[20] / Create a new permission group. This automatically gives this new employee user access to Personalwolke with the corresponding action permissions.

> WARNUNG
>
> It is **absolutely necessary** to add the employee to the group **XXX-ALLE**. This unlocks the basic menu items - without this setting, no navigation is possible in Personalwolke!

(If you also use other Personalwolke programs such as Project Time or Travel, this new employee is automatically assigned to the respective user permission groups here as well, provided you have configured a corresponding setting for these groups)

Then complete the selection with "Save".

> NOTIZ
>
> Note: every time you add a group, you must complete it with "Save" before further groups can be added.

Step 6b: Add further group(s)

The assignment of (new) employees to permission groups (loose groups) should be based on the Personalwolke Time permission concept[21].

The **group XXX-Admin** is normally given to employees who should be able to add / edit new persons in Personalwolke and create / edit groups (departments) in the organizational chart.
Membership in the **group XXX-Management** unlocks additional menu items for reports / statistics (usually given to HR staff / supervisors).

The assignment is made by clicking the corresponding row in the selection list and entering the Valid from/ Valid to dates. If no date is entered, the Valid from field is filled with today's date and the Valid to field with 1/1/3000.

By default, if you also use other modules, there are likewise three permission groups (loose groups) per module:

- User (XXX-ModuleName-User)
- Manager (XXX-ModuleName-Manager)
- Admin (XXX-ModuleName Admin)

For example, an employee with a corresponding function can belong to the permission group (loose group) XXX-PTM-Admin in addition to the permission group (loose group) XXX-ALLE, i.e., they have an admin function for Personalwolke Project Time

Once you have selected a group, click the blue "Save" button at the top left.

If you want to **add** the employee to **further permission groups** (loose groups), repeat the process.

In the table below you will find the groups that have already been assigned. By checking the box in the Delete column and clicking the blue "Save" button, you can remove the assignments again.

Examples

- Your employee should be able to use the time tracking and travel expense modules in Personalwolke.
  # Add them to the groups XXX-Alle and XXX-TM-User.
- Your employee is a new executive, records project times themselves, and should be able to evaluate the project times of their employees.
  => Add them to the groups XXX-PTM-User and XXX-PTM-Manager
- Your employee works in HR and should have access to the digital personnel file HR-Expert
  # Add them to the group XXX-HRX-User

NOTIZ

Note: adding a person to a group (organizational chart group, permission group, etc.) is also possible via Edit group / Add employees[22].

You can find more information on the topic of groups in the manual in the chapter "Groups[23]".

Step 6c: Assign to a location

If your organization has several locations, a new person must be assigned to a location before entering the time tracking data, if this person will work at such a location in the future.

Reason: the region of the location defines which holiday calendars are available for selection for this person in the "Settings" tab under Time tracking/Holiday calendar.

Step 7: "Roles" tab

Before you start assigning roles, you should answer the following questions:

- Will the employee's future area of responsibility include **approving requests**, e.g., vacation requests, travel expense reports, etc., in Personalwolke?
- Which roles does the new employee have in your company, e.g., supervisor, personnel, travel expense review?

If the answer to the first question is "no", you can skip this step.

By default, the following roles are used in Personalwolke:

- **Supervisor**
  - Approval of absences, time corrections, vacations, etc.
- **Personnel**
  - Approval of requests that often require labor law know-how, e.g., special leave, sick notes, special care leave

NOTIZ

The roles **Personnel** and **Supervisor** give the employee extended viewing permissions (a supervisor may, for example, view the monthly journal of the employees reporting to them) and unlock additional menu items. In addition, the two roles are used in the various workflows (vacation requests, time corrections, etc.) to control who has to approve these requests

Please click the "New role holder" button,

which opens the input screen:

The following input fields are available and must be filled in:

1. Role

You can select the role:

- by entering the full role name
- by entering the first letters and using autocomplete
- by clicking the three dots next to the input field, which opens the roles overview, and selecting from the list

2. Competence target

= what area of responsibility does the new role holder have?
Selection options:

- Persons
- Group
- Client

Once you have selected the type of competence target, you can make a precise selection in the field below: either by entering the whole name or the first letters of the name and using autocomplete, or by choosing someone or a group from the list that opens when you click the three dots next to the input field.

3. Valid from/Valid to

to limit possible assignments. If nothing is entered, the fields are filled with today's date and 01/01/3000, respectively.

4. Sequence

Enter here the rank the future role holder has in relation to the role.
Entering a number determines the order in which the system presents tasks and requests addressed to the role itself to the role holders.

All requests concerning the role are presented first to the first in the sequence (determined by entering "1" in this field).
Requests etc. are assigned to the second if the first role holder is unavailable. After the second come number 3, number 4 and so on.
It is possible to mix persons and groups in the sequence of a role assignment!

The sequence is entered as numbers (1, 2, 3, 4, 5....)

The "+" (plus) button lets you create **further role holders** for the role.

You can find a summary on the topic of sequence under FAQ: Sequence/order of role holders[1].

Clicking "Save" or "Save and close" completes the process. The assignment is effective from the selected "Valid from" date. If you selected the day on which you make the entry, it is immediately visible in the roles overview.

1. /daisy/webdesk-manual-admin/10035-dsy.html?language=4

Examples

- Mr. Mustermann is the new head of the sales department and is responsible in his department for approving vacation, absences, time corrections, etc.
  - Select Supervisor as the new role holder and the group Sales as the competence target.
- Ms. Schuster works in HR and is responsible for the entire company for reviewing and approving special leave, sick notes, care time, etc.
  - Select Personnel as the new role holder and your client as the competence target

NOTIZ

Note: adding a person to a role is also possible via Create and edit role assignments[24] ("Via the person who is to receive the role").

Step 8: "Settings" tab

In the "Settings" tab you will find subtabs for all functional modules. Click a subtab and then make the module-specific settings for the selected person. The list of modules differs depending on the subscription scope of your Personalwolke; at full scope these are:

- 8a - Travel[25]
- 8b - Workflow settings[26]
- 8c - Groupware[27]
- 8d - Time tracking[28]

8a - Travel

If the new person has access to a company car, it can be recorded here.
Clicking **"Add vehicle"** takes you to the input screen.
The following fields must be filled in here

- License plate
- Type
- Make
- Model
- Number of seats
- Fuel type
- Climate-friendly — YES if it is a climate-friendly vehicle so that this can be evaluated in reports.
- Valid from/Valid to — From when until when it is/was in use. For new entries, by default from today until unlimited (01/01/3000). A vehicle can only be assigned to trips on which the vehicle is/was in use at that time.

Several vehicles can be created per person. Existing entries can be edited or deleted using the buttons

and

.

Taxable distance from home to workplace: enter here the distance from the employee's home [in whole kilometers!]. This value serves as the basis for calculating the taxable portion of travel expenses. If home and workplace are identical, i.e., the entry is "0", the entire business trip route is taxable.

8b - Workflow settings

The following behavior settings can be defined here:

I would like to receive an email notification for new tasks

- **None**: The employee receives no email notifications
- **For every new task**: The employee receives an email from Personalwolke for every new task.
- **Summary of open tasks once a day**: The employee receives a list of all open tasks every day. - Test

I would also like to receive an email notification as a deputy: Yes / No

- This lets me switch email notifications on or off in my role as a deputy.

My deputy may approve for me

> NOTIZ
> Attention: here the term "deputy" refers to the role setting, not to an absence substitute!

- Yes: My deputy may approve for me
- No: My deputy may not approve and also does not receive a workflow

This parameter affects all requests submitted from the time of activation. In addition to the role holder, all downstream role holders (insofar as they are deputies according to the deputy arrangement) are entered as deputies in the requests. In this context, the inheritance direction within the role currently also has to be observed. If the inheritance direction is set to "up", the organizational chart is searched upward for deputies, with "down" downward, and with "none" not at all.

I would like to be notified at login if I have open tasks

- Yes: When you log in to Personalwolke, a pop-up with the number of open tasks is displayed.
- No: No pop-up appears

Preset role holders

If a request requires a processor to be specified, a default can be defined here for the corresponding role.

Workflow tasks

Here you have helper functions for resetting, which you can trigger by clicking.

- **"Reassign all open activities assigned to the person"**
  Role changes, employee transfers and the like can make it necessary to update assigned activities. Clicking this button starts the reassignment. It is applied immediately.
- **"Reassign all open activities of running processes started by this person"**
  This concerns the reverse direction: if the starters of such activities have changed due to changes in role and group membership, an update can be performed by clicking this button.

8c - Groupware

The Groupware module is an **extension** of the **Time & Attendance module**.

Since **time and appointment management** is often influenced by **different planning media** (e.g., vacation is planned in time tracking, a business trip in business trip management, or a special shift is assigned to an employee via a planning module), this module enables the **synchronization** of these appointment types into the **groupware calendar**. The employees' personal calendar is thus always up to date automatically and does not have to be maintained manually by the employee in the groupware system.

Clicking the **checkbox "activated for groupware"** integrates the newly created person into the groupware.

The "Test connection configuration" button can be used to verify the activation.

> NOTIZ
> Attention: this feature can only be activated or tested if the new person already has an email address in your company and it has already been entered under the "Master data" tab!

8d - Time tracking

Please refer to the menu item "Configuring time tracking for a newly created person[29]".

If you have already created the person and want to activate time tracking retroactively, you will find the necessary information under Activating time tracking retroactively[30].

NOTIZ

Note: If other modules, e.g., Project Time, are also used, the selection list for the "Settings" tab may contain further items, e.g., "Book project time".

1. /daisy/webdesk-manual-admin/9821-dsy.html?language=4
2. /daisy/webdesk-manual-admin/6350-dsy.html?language=4
3. /daisy/webdesk-manual-admin/9807-dsy.html?language=4
4. /daisy/webdesk-manual-admin/9821-dsy.html?language=4
5. /daisy/webdesk-manual-admin/7066-dsy.html?language=4
6. /daisy/webdesk-manual-admin/6453-dsy.html?language=4
7. /daisy/webdesk-manual-admin/5884-dsy.html?language=4
8. /daisy/webdesk-manual-admin/9793-dsy.html?language=4
9. /daisy/webdesk-manual-admin/9853-dsy.html?language=4
10. /daisy/webdesk-manual-admin/9408-dsy.html?language=4